Taking Stock
Implementing and Integrating Inventory in 8.9

Session 27377
March 1, 2010
12:45 – 1:45
Your Presenter

Maria Whitaker

– Business Analyst
Florida State University

Current enrollment 40,255
FSU and Oracle PeopleSoft

- Financials 8.4 Implementation July 2004
- Upgrade to 8.9 November 2006
  - MP5 applied April 2007
- Upgrade to 9.0 April 2009
- Financials Modules include:
  - GL with Commitment Control
  - Accounts Receivable/Billing
  - Purchasing/ePro (w/workflow)
  - Asset Management
  - Projects/Grants/Contracts
  - Travel & Expense (w/workflow)
  - Accounts Payable
  - Inventory/Cost Management
Session Overview

• Project background and objectives
• Functionality used
• Maintenance Management overview
• Maintenance Management integration with Inventory
• Maintenance Management integration with Purchasing
• Inventory integration with Purchasing
Legacy Systems and Process Flow

1. FMP Work Order System
2. FMP Inventory & Purchasing System
3. PS ePro/Purchasing & Receiving
4. FMP Inventory & Purchasing System
5. FMP Work Order System
6. MySoft Billing
Project Background and Objectives

• Overview and mission
  – Implementation was specific to our Office of Telecommunications

• Goals
  – Reduce redundancy, increase inventory control, and improve audit trails

• Scope
  – Inventory
  – Cost Accounting
  – Utilize items
  – Maintenance Management
New Process Flow

- FMP Work Order System
  - PS Maintenance Management
    - PS Inventory
      - PS Purchasing & Receiving
        - PS Inventory
          - FMP Work Order System
            - MySoft Billing
### Functionality Used

#### Maintenance Management

- **Established Item Master**
- **Custom interface**
  - FMP Work Order system to PS MM
  - Header level information
- **Two types of demand:**
  - Inventory
  - Purchase/On-Hand
- **Two integration points:**
  - Inventory module
  - Purchasing module

#### Inventory

- **Replenishment**
- **Picking**
- **Putaways**
- **Issue to work orders**
- **Inventory counts**
Maintenance Management Overview

Work Order Requirements

Maintenance Management > Work Orders > Requirements (tab), Inventory
Maintenance Management Overview

Work Order Requirements

Maintenance Management > Work Orders > Requirements (tab), Purchase/On-Hand

Special Purchase

Task Number: 1
*Sequence: 100
*Task Description: CASS

Status: Open
Required Start: 12/16/2009 8:00AM
Required End: 12/16/2010 5:00PM
Duration: 1 Hours
Dependent Task: 
Overlap %: As of 12/16/2009

Special Purchase for CASS

Task Number: 2
*Sequence: 200
*Task Description: Networking

Status: Open
Required Start: 12/16/2009 8:00AM
Required End: 12/16/2010 5:00PM
Duration: 1 Hours
Dependent Task: 
Overlap %: As of 12/16/2009

Special Purchase for Networking

Additional Task Data
Asset Information
Problem Reporting

Labor Inventory Purchase/On-hand Tools Instructions Checklist Attachments Task Templates Supplemental Data

Line No. Item ID Description Resource Type Planned Quantity UOM On-hand Delivery Flags Delivery Instructions

1 Special Purchase for CASS Material 1.000 EA Not Specified

1 Special Purchase for Networking Material 1 EA Not Specified

1 Special Purchase for Networking Material 1 EA Not Specified
# Maintenance Management Overview

## Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)

### Schedules for Task

<table>
<thead>
<tr>
<th>Task Number:</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Sequence:</em></td>
<td>100</td>
</tr>
<tr>
<td><em>Task Description:</em></td>
<td>CASS</td>
</tr>
<tr>
<td>Status:</td>
<td>Open</td>
</tr>
<tr>
<td>As of:</td>
<td>12/16/2009</td>
</tr>
</tbody>
</table>

### Required Dates

| Required Start: | 12/16/2009 8:00AM |
| Required End: | 12/16/2010 5:00PM |
| Scheduled Start: | 12/16/2009 8:00AM |
| Scheduled End: | 12/16/2010 5:00PM |

### Duration

| Duration: | 1 Hours |
| Dependent Task: | |
| Overlap %: | |

### Asset Information

- Copy From Requirements
- Inventory
- Purchase/On-hand
- Tools
- Instructions
- Checklist
- Attachments
- Task Templates
- Supplemental Data
- Notes
- Item Availability
- Picking Plan
- Picking Plan Setup
- Shortage Workbench

### Inventory Schedules

<table>
<thead>
<tr>
<th>Line No.</th>
<th>Select</th>
<th>Item ID</th>
<th>Description</th>
<th>Scheduled Quantity</th>
<th>UOM</th>
<th>Schedule Needed Date</th>
<th>Planned Quantity</th>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>ACS001</td>
<td>INDOOR SIREN 2 TONE WALL MOUNT</td>
<td>1.0000</td>
<td>EA</td>
<td>12/16/2009</td>
<td>31</td>
<td>Inventory</td>
</tr>
</tbody>
</table>

### Additional Information

- Save
- Return to Search
- Notify
- Refresh
Maint. Mgmt. Integration with Inventory

**Process Flow**

1. **Work Order Schedules**
2. **Create Picking Plan in Inventory**
3. **Issue to Work Orders from Inventory**
4. **Replenishment for Unavailable Quantities**
Maint. Mgmt. Integration with Inventory

Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)
Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory

Inventory > Fulfill Work Orders > Issue to Work Orders > WO Issue Search (tab)
Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory
Inventory > Fulfill Work Orders > Issue to Work Orders > WO Issue Location (tab)
Maint. Mgmt. Integration with Purchasing

Process Flow

Work Order Schedules

Load Requisitions from Work Order Schedules

Requisition Load Process

Source Requisition to PO and Dispatch
## Work Order Schedules

**Maintenance Management > Work Orders > Schedules (tab)**

### Schedules for Task

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Required Start</th>
<th>Required End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12/16/2009</td>
<td>12/16/2010</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Required Start</th>
<th>Required End</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASS</td>
<td>12/16/2009</td>
<td>12/16/2010</td>
</tr>
</tbody>
</table>

### Asset Information

**Copy From Requirements**

- Labor
- Inventory
- Purchase/On-hand
- Tools
- Instructions
- Checklist
- Attachments
- Task Templates
- Supplemental Data

<table>
<thead>
<tr>
<th>Notes</th>
<th>Item Availability</th>
<th>Add Requisition</th>
<th>Load Requisition(s)</th>
<th>Procurement Inquiry</th>
</tr>
</thead>
</table>

### Purchase/On-Hand Schedules

<table>
<thead>
<tr>
<th>Line No.</th>
<th>Select Item ID</th>
<th>Description</th>
<th>Planned Quantity</th>
<th>Vendor ID</th>
<th>Vendor Location</th>
<th>Category</th>
<th>Ship To</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Special purchase for</td>
<td>1.0000</td>
<td>00000000664</td>
<td>001</td>
<td>10100001</td>
<td>SRSB2</td>
<td>SRSB2</td>
</tr>
</tbody>
</table>

**Customize | Find | View All | First | Last**
Maint. Mgmt. Integration with Purchasing

Requisitions Load Process
Purchasing > Requisitions > Load Requisitions
Maint. Mgmt. Integration with Purchasing

Requisition Created from a Work Order
Purchasing > Requisitions > Maintain Requisitions

Maintain Requisitions

Requisition

Business Unit: FSU01
Requisition ID: 0000514269
Status: Approved
Budget Status: Not Chkd
Hold From Further Processing

*Requester: JRENNER
*Requisition Date: 02/17/2010
Origin: ONL
*Currency Code: USD
Accounting Date: 02/17/2010

Amount Summary
Total Amount: 1.00 USD

Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display
Line: To: Retrieve

View Printable Version

*Go to: More...
### Maintain Requisitions

**Schedule**

<table>
<thead>
<tr>
<th>Line</th>
<th>Item:</th>
<th>Quantity:</th>
<th>Amount:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Special purchase for CASS</td>
<td>1.0000 Each</td>
<td>1.00 USD</td>
</tr>
</tbody>
</table>

**Details**

<table>
<thead>
<tr>
<th>WO Business Unit</th>
<th>Work Order ID</th>
<th>Task Number</th>
<th>Resource Type</th>
<th>Resource Line No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSU01</td>
<td>TSR684510</td>
<td>1</td>
<td>Material</td>
<td>1</td>
</tr>
</tbody>
</table>

*Add Ship To Comments*
Inventory Integration with Purchasing

Reorder Point Replenishment
Inventory > Replenish Inventory > Create Replenishment Requests
Reorder Point Replenishment

Inventory Integration with Purchasing

Inventory > Replenish Inventory > Manage Replenishment Requests

**Manage Replenishment Requests**

| Unit: FSU01 | Replenish Status: **Ready** |

**Replenishment Request**

<table>
<thead>
<tr>
<th>Replen ID: 174 Reorder Pt</th>
<th>Process Date: 02/17/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item ID: ACS001</td>
<td>User ID: SYSTEM</td>
</tr>
<tr>
<td>INDOOR SIREN 2 TONE WALL MOUNT</td>
<td>Source: SRSB218</td>
</tr>
<tr>
<td>Location: SRSB218</td>
<td>Expected By: 03/10/2010</td>
</tr>
</tbody>
</table>

Source: SRSB218

Reorder Quantity: 2.0000 EA

Status: Ready

Required By: [Blank]

**Requisition Detail**

<table>
<thead>
<tr>
<th>Details</th>
<th>PO Unit:</th>
<th>Requisition ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Requisition Schedule Number: [Blank]

Requisition Line Number: [Blank]

Save  Notify
Inventory Integration with Purchasing

Requisition Load Process

Purchasing > Requisitions > Load Requisitions
### Inventory Integration with Purchasing

**Requisition Created from a Work Order**

**Purchasing > Requisitions > Maintain Requisitions**

#### Maintain Requisitions

**Requisition**

- **Business Unit:** FSU01
- **Requisition ID:** 0000514277
- **Status:** Approved
- **Budget Status:** Not Chked
- **Requester:** JRENNER, JAMES
- **Requisition Date:** 02/17/2010
- **Origin:** ONL FSU ONLINE ENTRY
- **Currency Code:** USD
- **Accounting Date:** 02/17/2010

#### Add Items From

- **Item Search**
- **Catalog**
- **Requester Items**

#### Select Lines To Display

- **Line:**
- **Description:** Mfg #. 747. INDOOR
- **Quantity:** 2.0000
- **UOM:** EA
- **Category:** 4322500
- **Price:** 14.6000
- **Amount:** 29.20
- **Status:** Approved

---

**Go to:** ...More...

**View Printable Version**

- **Save**
- **Return to Search**
- **Notify**
- **Refresh**
# Inventory Integration with Purchasing

## Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions > Requisition Defaults (link)

---

<table>
<thead>
<tr>
<th>Maintain Requisitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requisition Defaults</strong></td>
</tr>
<tr>
<td><strong>Business Unit:</strong> FSU01</td>
</tr>
<tr>
<td><strong>Requisition ID:</strong> 0000514277</td>
</tr>
</tbody>
</table>

### Default Options

- **Default:** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

- **Override:** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

### Line

| Buyer: | PWSULLIVAN | SULLIVAN, PHYLLIS |
| Vendor: | 0000015951 | ADT SECURITY SERVICES |
| Category: | 43222500 |

### Schedule

| Ship To: | SOTCWH1 | OTC WAREHOUSE 1 |
| Due Date: | | |
| Ultimate Use Code: | | |

### Distribution

### Distributions

<table>
<thead>
<tr>
<th>Dist</th>
<th>Percent</th>
<th>GL Unit</th>
<th>Dept</th>
<th>Fund</th>
<th>IN Unit</th>
<th>PC Bus Unit</th>
<th>Project</th>
<th>Activity</th>
<th>Source Type</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100.0000</td>
<td>FSU01</td>
<td>028001</td>
<td>320</td>
<td>FSU01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Project Outcomes

Before

1. FMP Work Order System
2. FMP Inventory & Purchasing System
3. PS ePro/Purchasing & Receiving
4. FMP Inventory & Purchasing System
5. FMP Work Order System
6. MySoft Billing

After

1. FMP Work Order System
2. PS Maintenance Management
3. PS Inventory
4. PS Purchasing & Receiving
5. PS Inventory
6. FMP Work Order System
7. MySoft Billing
Questions?
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